SENIORS' HOUSING REPORT
Saskatchewan

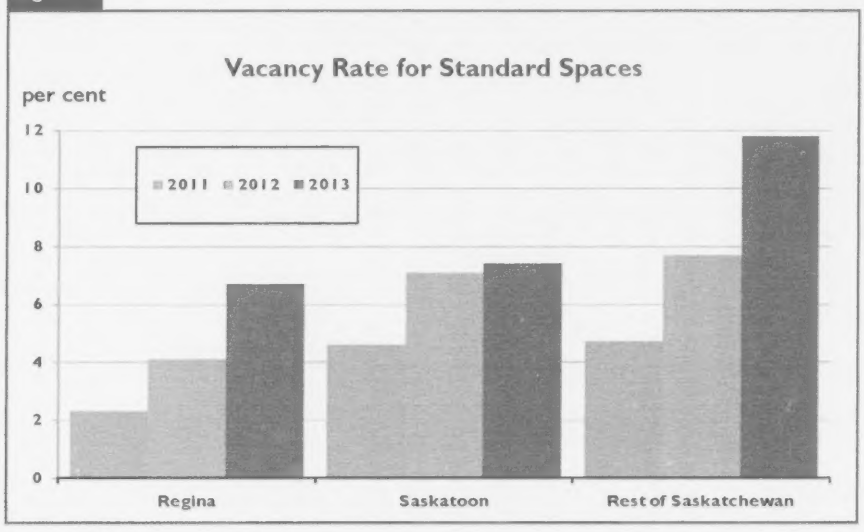
CANADA MORTGAGE AND HOUSING CORPORATION

Date Released: 2013

Highlights

- Saskatchewan had an overall vacancy rate of 8.8 per cent for standard spaces in retirement homes in 2013, compared to 6.7 per cent in 2012.
- Regina and Saskatoon, the two largest urban centres, reported standard unit vacancy rates of 6.7 per cent and 7.4 per cent, respectively.
- The overall average rent in Saskatchewan for a standard retirement home space was $2,505 in 2013, compared to $2,435 in the previous year's survey.
- The 2013 survey in Saskatchewan identified 159 residences containing a total of 5,835 standard and non-standard spaces and housing 5,824 residents.

Figure 1



Source: CMHC

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Saskatchewan Vacancy Rate of Standard and Total (Universe) Spaces

Vacancy

Vacancy rate for standard care units moved higher in 2013

According to Canada Mortgage and Housing Corporation's (CMHC) 2013 Seniors' Housing Survey, the average vacancy rate for a standard retirement space in Saskatchewan was 8.8 per cent in 2013, up from 6.7 per cent in the year prior. CMHC's survey targeted private and non-profit facilities where the majority of residents are over the age of 65 and have access to additional services not offered in traditional rental structures such as a meal plan, housekeeping, and laundry services.

Among Saskatchewan's two Census Metropolitan Areas (CMAs), Regina reported the lower overall vacancy rate for standard spaces at 6.7 per cent in 2013, compared to 4.1 per cent in 2012. In the Saskatoon CMA, the vacancy rate was 7.4 per cent in 2013, up from 7.1 per cent a year earlier. Outside the two CMAs, the Rest of Saskatchewan had a vacancy rate of 11.8 per cent in 2013, compared to 7.7 per cent in 2012.

Provincially, the vacancy rate in 2013 was highest for standard units in semi-private spaces at 34 per cent, up from 16.7 per cent in 2012. However, it is important to note that the vacancy rate for this unit type was based on a small universe. As a result, small changes in the number of units vacant can have a strong impact on the overall vacancy rate. Meanwhile, the vacancy rate for one-bedroom units was 10.5 per cent in 2013, up from 6.7 per cent in 2012. Standard bachelor spaces reported a vacancy rate of 7.7 per cent, up from 6.7 per cent in 2012's survey. The lowest vacancy rate was reported in two-bedroom and larger spaces at 6.7 per cent, up from 5.1 per cent in 2012.

In the Regina CMA, the lowest vacancy rate in 2013 was for two-bedroom and larger spaces at 4.0 per cent, compared to 4.9 per cent in 2012. The highest vacancy rate of 9.6 per cent was for one-bedroom spaces. In Saskatoon, the highest vacancy rate was found in bachelor spaces at 9.5 per cent, up from 7.4 per cent one year earlier. Similar to Regina, Saskatoon's lowest vacancy rate was found in two-bedroom and larger spaces at 1.4 per cent. Outside the two CMAs, the lowest vacancy rate was found in bachelor spaces at 7.9 per cent.

The 2013 Seniors' Housing Survey identified vacancy rates by rent range for standard spaces, revealing variation in vacancy depending on monthly rent. In Saskatoon, the highest vacancy rate of 10.3 per cent was for spaces renting for at least $2,500 per month. The lowest reported vacancy rate among rent ranges in Saskatoon was 1.2 per cent, found in spaces that rented for less than $1,500 monthly. In Regina, the average vacancy rate was 6.2 per cent for standard spaces renting for at least $2,500 per month and 8.5 per cent for spaces renting from $2,000 to $2,499.

Vacancies for heavy care spaces increase

In Saskatchewan, the vacancy rate for heavy care spaces was 4.9 per cent in 2013, compared to no vacancies in 2012. Heavy care spaces are classified as spaces in seniors' residences that provide 1.5 hours or more of health care per day to its residents. Examples include care for residents with Alzheimer, Dementia and mobility support residents. Typically, the additional health care services provided to residents of heavy care facilities increases the rent over standard spaces.

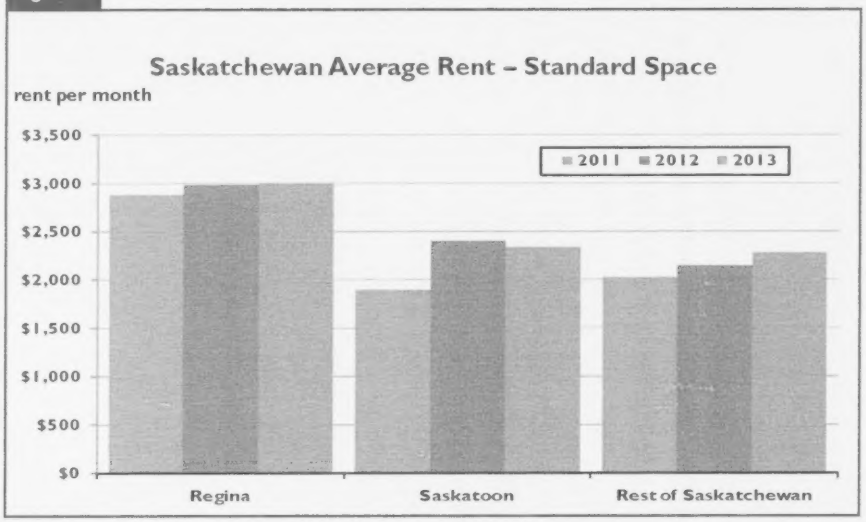
Rents

Provincial average rent of standard spaces moves higher in 2013

In Saskatchewan, the overall average rent for a standard space was $2,505 per month in 2013, compared to $2,435 in 2012. The average monthly rent for all spaces in the Regina CMA was $3,011, compared to $2,992 in 2012. In the Saskatoon CMA, the overall average monthly rent was $2,340, compared to $2,403 in 2012.

Of the two major urban centers, Regina reported the highest average rent for two-bedroom and larger spaces in 2013 at $3,768 per month, up from an average of $3,714 one year earlier. The lowest monthly average rent in Regina was $2,781 per month for bachelor spaces. In Saskatoon, the average rent for two-bedroom and

Figure 2



Source: CMHC

larger spaces was $2,554 per month, down from $2,797 in the year prior. One-bedroom spaces reported the lowest average monthly rent at $2,314 in 2013, down from $2,365 in the 2012 survey.

Saskatchewan's universe of standard spaces by rent range is reported in Table 2.3. According to the 2013 survey, almost 50 per cent of seniors' standard spaces in Saskatchewan rented for at least $2,500 per month. Provincially, standard spaces renting for below $1,500 in 2013 amounted to less than nine per cent of the universe. In Regina, just over 11 per cent of total standard spaces rented for under $2,000 per month. In contrast, Saskatoon reported almost 33 per cent of its standard spaces rented for less than $2,000 per month.

Average rent for heavy care spaces

In Saskatchewan, the average rent for a heavy care space in 2013 was $3,597 per month, compared to $3,725 in 2012. This was higher than the average monthly rent for standard spaces as the health care service a resident requires in heavy care adds to the cost of rent. In Regina, the average rent for a heavy care space was $3,837 per month in 2013, compared to $3,950 in 2012.

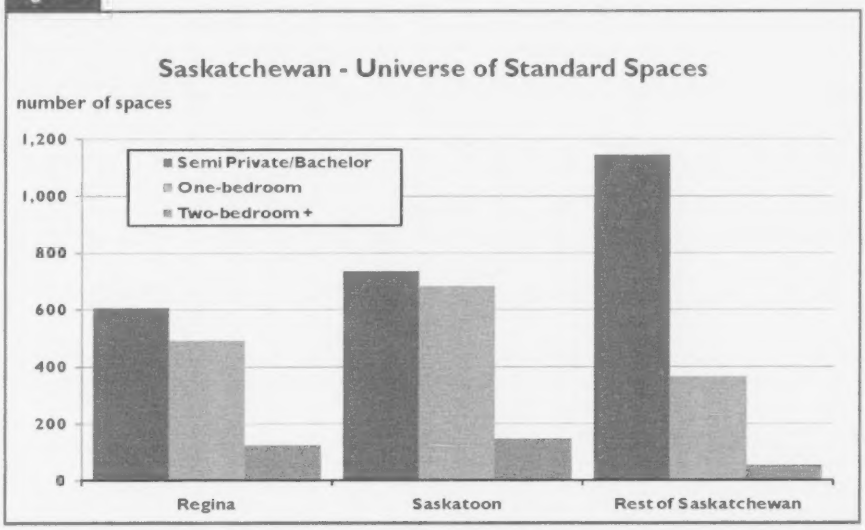
Universe

Universe of Retirement Spaces

CMHC's Seniors' Housing Survey identified 5,835 total retirement spaces in 2013, up from 5,531 spaces in the 2012 survey. The majority were identified as standard spaces, which totalled 4,427. The remaining were non-standard spaces, which included heavy care spaces, non-market or rental subsidy spaces, and some spaces being used to provide respite care. Overall, the survey universe in 2013 grew by 5.5 per cent from a year earlier, following increases of 5.2 per cent in 2012 and 12.3 per cent in 2011.

In Saskatchewan, semi-private and bachelor spaces were the most common, amounting to 2,534 spaces or just over 57 per cent of the standard universe in 2013. The majority of standard spaces in the Regina CMA and Saskatoon CMA were also semi-private and bachelor

Figure 3



Source: CMHC

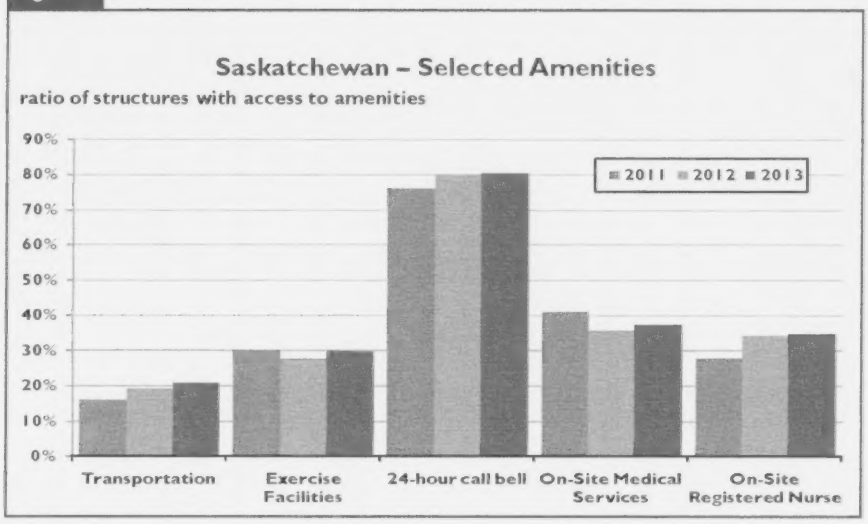
spaces, at nearly 50 per cent and 48 per cent of each CMA's standard universe, respectively. Outside the two CMAs, the composition of standard spaces for the Rest of Saskatchewan was 73 per cent for semi-private and bachelor units, 23.5 per cent for one-bedroom spaces, and 3.5 per cent for two-bedroom and larger spaces.

Services and Amenities

The Seniors' Survey targeted residences where the majority of residents are seniors that have access to additional services not offered in traditional rental structures, such as an on-site meal plan. Seniors' residents were offered a variety of different amenities depending on the residence.

As was the case in previous years, the most common amenity in Saskatchewan was a 24-hour bell service, which was provided in more than 80 per cent of structures. The second most common amenity was on-site medical services, which was available in more than 37 per cent of structures in the province. Other popular amenities accessible to residents included a registered nurse on site, exercise facilities, internet and transportation services.

Figure 4



Source: CMHC

TABLES INCLUDED IN THE SASKATCHEWAN SENIORS' HOUSING REPORT

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1.1 Vacancy Rates (%) of Standard Spaces by Unit Type
Saskatchewan

Centre	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Regina CMA	**	**	4.2	5.0	3.7	9.6	4.9	4.0	4.1	6.7
Saskatoon CMA	**	**	7.4	9.5	8.0	6.6	1.6	1.4	7.1	7.4
Rest of Saskatchewan	20.4	47.6	7.4	7.9	7.1	19.1	**	27.8	7.7	11.8
Saskatchewan	**16.7**	**34.0**	**6.7**	**7.7**	**6.7**	**10.5**	**5.1**	**6.7**	**6.7**	**8.8**

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

1.2 Vacancy Rates of Standard Spaces (%) by Rent Range ($)
Saskatchewan

Centre	Less than $1,500		$1,500 - $1,999		$2,000 - $2,499		$2,500 and more		Total where rents are known	
	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Regina CMA	**	**	3.0	**	5.5	8.5	3.8	6.2	3.9	6.7
Saskatoon CMA	**	1.2	5.3	3.9	4.2	8.5	10.7	10.3	7.1	7.4
Rest of Saskatchewan	9.5	6.9	7.5	8.6	5.5	11.9	9.9	15.5	7.7	11.8
Saskatchewan	**4.7**	**1.8**	**6.4**	**7.7**	**5.0**	**10.6**	**8.0**	**9.5**	**6.7**	**8.8**

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care). Second person extra charge is also excluded from the calculation.

1.3 Vacancy Rates (%) and Average Rents ($) of Heavy Care Spaces[1]
Saskatchewan

Centre	Vacancy Rate		Average Rent	
	2012	2013	2012	2013
Regina CMA	0.0	0.0	3,950	3,837
Saskatoon CMA	**	**	**	**
Rest of Saskatchewan	**	7.3	**	**
Saskatchewan	**0.0**	**4.9**	**3,725**	**3,597**

[1] Non-market heavy care units are excluded from Average Rents, but are included in Vacancy Rate.

The following letter codes are used to indicate the reliability of the estimates:
a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)
** Suppressed to protect confidentiality ++ Not statistically reliable -- No units exist in universe for this category

1.4 Universe, Number of Residents Living in Universe and Capture Rate (%)
Saskatchewan

Centre	Total Number of Spaces	Overall Vacancy Rate (%)		Number of Residences	Number of Residents	Estimated Population Aged 75+[1]	Capture Rate[2] (%)
		2012	2013				
Regina CMA	1,386	3.2	5.9	37	1,385	. . . . .	. . . . .
Saskatoon CMA	2,624	4.3	5.1	63	2,752	. . . . .	. . . . .
Rest of Saskatchewan	1,825	7.5	11.3	59	1,687	. . . . .	. . . . .
Saskatchewan	**5,835**	**5.1**	**7.2**	**159**	**5,824**	**79,600**	**7.3**

[1] Source: Table 11-10, Population by age group and sex, medium-growth - historical trends (1981 to 2008) scenario (M1) July 1st - Saskatchewan, 2010 to 2036. Statistics Canada - Catalogue no. 91-520-X

[2] The capture rate is the proportion of the population aged 75 and over living in the survey universe.

The following letter codes are used to indicate the reliability of the estimates:

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2.1 Universe of Total Spaces by Unit Type
Saskatchewan

Centre	Semi Private / Bachelor	One Bedroom	Two Bedroom +	Total
Regina CMA	708	553	125	1,386
Saskatoon CMA	995	1,353	276	2,624
Rest of Saskatchewan	1,370	401	54	1,825
Saskatchewan	**3,073**	**2,307**	**455**	**5,835**

2.2 Universe by Unit Type
Saskatchewan

Centre	Semi Private / Bachelor	One Bedroom	Two Bedroom +	Total
Regina CMA	**708**	**553**	**125**	**1,386**
Standard Spaces	604	491	125	1,220
Non-Standard Spaces	104	62	-	166
Saskatoon CMA	**995**	**1,353**	**276**	**2,624**
Standard Spaces	785	709	148	1,642
Non-Standard Spaces	210	644	128	982
Rest of Saskatchewan	**1,370**	**401**	**54**	**1,825**
Standard Spaces	1,145	366	54	1,565
Non-Standard Spaces	225	35	-	260
Saskatchewan	**3,073**	**2,307**	**455**	**5,835**
Standard Spaces	2,534	1,566	327	4,427
Non-Standard Spaces	539	741	128	1,408

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2.3 Universe of Standard Spaces by Rent Range ($)
Saskatchewan

Centre	Less than $1,500	$1,500 - $1,999	$2,000 - $2,499	$2,500 and more
	% of Total[1]	% of Total[1]	% of Total[1]	% of Total[1]
Regina CMA	5.2	6.1	10.7	78.0
Saskatoon CMA	16.4	16.3	16.7	50.6
Rest of Saskatchewan	3.7	26.9	42.7	26.7
Saskatchewan	**8.8**	**17.2**	**24.2**	**49.8**

[1] % is based on those spaces where the rent is known.

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

2.4 Proportion (%) of Structures where Select Services are Available[1] by Structure Size
Saskatchewan

Centre	Meals				On-Site Medical Services	Registered Nurse onsite[2]	24-hour call bell	Pharmacy
	Optional	# included in rent						
		1	2	3				
Regina CMA	5.4	0.0	8.1	86.5	48.6	51.4	89.2	0.0
10 - 49	3.7	0.0	0.0	96.3	44.4	55.6	88.9	0.0
50 - 89	25.0	0.0	0.0	75.0	100.0	75.0	75.0	0.0
90 or more	0.0	0.0	50.0	50.0	33.3	16.7	100.0	0.0
Saskatoon CMA	19.4	8.1	1.6	71.0	29.0	35.5	71.0	0.0
10 - 49	7.0	0.0	0.0	93.0	32.6	44.2	79.1	0.0
50 - 89	55.6	22.2	**	22.2	22.2	11.1	66.7	**
90 or more	40.0	**	10.0	20.0	20.0	20.0	40.0	**
Rest of Saskatchewan	0.0	0.0	5.1	94.9	39.0	23.7	84.7	0.0
10 - 49	0.0	0.0	6.0	94.0	38.0	22.0	84.0	0.0
50 - 89	0.0	0.0	0.0	100.0	50.0	33.3	83.3	0.0
90 or more	**	**	**	**	**	**	**	**
Saskatchewan	**8.9**	**3.2**	**4.4**	**83.5**	**37.3**	**34.8**	**80.3**	**0.0**
10 - 49	3.4	0.0	2.5	94.2	37.5	37.5	83.3	0.0
50 - 89	31.8	10.6	0.0	57.6	47.2	31.4	73.6	0.0
90 or more	21.2	15.9	21.0	41.9	26.3	21.0	68.2	0.0

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

[2] Registered Nurse on site means a RN, not a RPN or LPN.

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2.5 Proportion (%) of Structures with Access to Selected Amenities[1] by Structure Size
Saskatchewan

Centre	Transport-ation Services	Swimming Pool	Hot Tub - Spa	Movie Theatre	Exercise Facilities	Internet
Regina CMA	32.4	5.4	18.9	21.6	32.4	29.7
10 - 49	18.5	0.0	7.4	7.4	14.8	18.5
50 - 89	25.0	25.0	25.0	25.0	50.0	50.0
90 or more	100.0	16.7	66.7	83.3	100.0	66.7
Saskatoon CMA	16.1	1.6	4.8	6.5	29.0	21.0
10 - 49	9.3	0.0	0.0	0.0	11.6	14.0
50 - 89	22.2	**	11.1	11.1	44.4	**
90 or more	40.0	10.0	20.0	**	90.0	40.0
Rest of Saskatchewan	18.6	0.0	8.5	3.4	28.8	23.7
10 - 49	10.0	0.0	4.0	2.0	22.0	24.0
50 - 89	66.7	0.0	33.3	0.0	66.7	16.7
90 or more	**	**	**	**	**	**
Saskatchewan	**20.9**	**1.9**	**9.5**	**8.8**	**29.7**	**24.0**
10 - 49	11.7	0.0	3.3	2.5	16.6	19.1
50 - 89	36.7	5.2	21.0	10.5	52.6	31.6
90 or more	63.0	10.5	36.7	47.2	89.5	47.3

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

3.1 Average Rent ($) of Standard Spaces by Unit Type
Saskatchewan

Centre	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Regina CMA	**	**	2,796	2,781	3,084	3,101	3,714	3,768	2,992	3,011
Saskatoon CMA	**	**	2,372	2,326	2,365	2,314	2,797	2,554	2,403	2,340
Rest of Saskatchewan	1,659	1,753	1,971	2,101	2,627	2,657	**	3,676	2,147	2,282
Saskatchewan	**1,723**	**1,829**	**2,256**	**2,336**	**2,605**	**2,639**	**3,214**	**3,194**	**2,435**	**2,505**

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

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O1 Building Structure Makeup (%)
Saskatchewan

Centre	Concrete Frame	Wood Frame
Saskatchewan	**24.5**	**75.5**

O2 Ancillary Services, Cable and Telephone and Optional Costs (% of residences)
Saskatchewan

Centre	Services	Included in Rent (%)	Tenant Arrange (%)	Optional (%)	Average Cost if Optional ($)
Regina CMA	Cable	27.0	70.3	2.7	**
	Telephone	**	97.3	2.7	**
Saskatoon CMA	Cable	23.8	69.8	4.8	**
	Telephone	**	100.0	**	**
Rest of Saskatchewan	Cable	20.3	64.4	15.3	30.67
	Telephone	1.7	96.6	1.7	**
Saskatchewan	**Cable**	**23.3**	**67.9**	**8.2**	**31.77**
	Telephone	**0.6**	**98.1**	**1.3**	**

O3 Vacancy Rates (%) of Standard Spaces by Date Residence Opened
Saskatchewan

Centre	Before 1990	1990 - 1999	2000 or later	Total
Regina CMA	**	8.5	5.9	6.7
Saskatoon CMA	4.0	6.6	9.2	7.4
Rest of Saskatchewan	6.0	7.2	13.7	11.8
Saskatchewan	**4.9**	**7.4**	**10.0**	**8.8**

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O4 Average Rents ($) of Standard Spaces by Date Residence Opened
Saskatchewan

Centre		Before 1990	1990 - 1999	2000 or later	Total
Regina CMA	Semi Private	**	**	**	**
	Bachelor	**	2,644	2,848	2,781
	One Bedroom	**	**	3,063	3,101
	Two Bedroom +	**	**	3,581	3,768
	All	**	2,986	3,022	3,011
Saskatoon CMA	Semi Private	**	**	**	**
	Bachelor	1,759	2,262	2,596	2,326
	One Bedroom	**	**	2,824	2,314
	Two Bedroom +	**	**	2,825	2,554
	All	1,360	2,422	2,712	2,340
Rest of Saskatchewan	Semi Private	**	**	**	1,753
	Bachelor	2,028	2,009	2,142	2,101
	One Bedroom	**	**	2,690	2,657
	Two Bedroom +	**	**	3,676	3,676
	All	2,028	2,060	2,368	2,282
Saskatchewan	**Semi Private**	**	**	**1,641**	**1,829**
	Bachelor	**1,907**	**2,302**	**2,444**	**2,336**
	One Bedroom	**1,019**	**2,744**	**2,867**	**2,639**
	Two Bedroom +	**	**3,253**	**3,350**	**3,194**
	All	**1,591**	**2,528**	**2,671**	**2,505**

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Methodology

Canada Mortgage and Housing Corporation conducts the Seniors' Housing Survey in February and March. This annual survey became national in scope in 2009, covering all centres in each of the ten provinces. Both private and non-profit residences are included in the survey universe. Non-profit residences must have at least one unit that is not subsidized.

To be eligible for inclusion in the 2013 survey results, a residence must:

- ✓ Have been in operation for at least one year, i.e., before January 2012
- ✓ Have at least 10 rental units (Quebec, Ontario, Prairies) or 5 rental units (Atlantic provinces and B.C.)
- ✓ Offer an on-site meal plan
- ✓ Not provide high levels of healthcare (defined as 1.5 hours or more of care per day) to all of their residents. Nursing homes and long-term care homes are examples of residences that were not included in the survey.
- ✓ Offer rental units. Life lease units and owner-occupied units are excluded from this survey.
- ✓ Have at least 50% of residents who are 65 years of age or older.

The Seniors' Housing Survey is a census and not a sample survey, therefore, all seniors' residences in Canada meeting these criteria are included to be part of this survey.

Survey data were obtained through a combination of telephone interviews and fax and email responses. Information was obtained from the owner, manager, or residence administrator. Survey results reflect market conditions at the time of the survey. Survey results have been weighted to adjust for non-responses, to ensure that they are reflective of the universe. The level of statistical reliability is noted in the data tables. For more information on the reliability of the data please click here.

All statistics published, excluding information on new market supply, include only those residences that have been in operation for at least one year.

Definitions

Space: A space is a residential area that is rented out. Examples of spaces include: one half of a semi-private unit, a private or bachelor unit, a one-bedroom unit and a two-bedroom unit. In most cases a space is the same as a unit. The exception is the case where a unit has been divided to rent to multiple residents. Semi-private and ward units are an example of this. Unless otherwise indicated, data for spaces are for all unit types.

Standard Space: A space where the resident does not receive high-level care (i.e., the resident receives less than 1.5 hours of care per day.) or is not required to pay an extra amount to receive high-level care. Regional terms for this type of space may vary across the country.

Heavy Care Space: A space where the resident is paying an extra amount to receive high-level care (1.5 hours or more of care per day). Examples include Alzheimer, Dementia and mobility support residents.

Respite Space: A space used to provide temporary accommodation for a senior who normally lives in another place and not at the residence.

Non-market or Subsidy Space: A space where the rent received for the unit is less than market rent or where the resident occupying the unit is subsidized.

Rent: Refers to the actual amount a resident pays per month for their accommodation space and all mandatory services. For vacant spaces, the rent is the amount the owner is asking for the space.

Vacancy: A space is considered vacant if, at the time of the survey, it is physically unoccupied and available for immediate rental.

Capture Rate: The main age group living in seniors' residences are persons aged 75 years and older. Capture rate in a centre is the ratio of the total number of residents living in the survey universe divided by its estimated 75+ population, expressed as a percentage.

Acknowledgement
The Seniors' Housing Survey could not have been conducted without the cooperation of the residence owners and their staff. CMHC acknowledges their time and assistance in providing accurate information. As a result of their contribution, CMHC is able to provide data and analysis that benefits the entire industry.

Confidentiality
All information provide through this survey is kept strictly confidential and only used by CMHC to generate statistics and data sets that do not allow for the identification of individuals, households, businesses or buildings.

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